Pale/Time Stamps

Employee Post-Travel Disclosure of Travel Expenses

17 SEP 28 PM 3: 11

Post-Travel Elling Inst travel, Submit all forms	IQ IIIC OITICE ÖL VAN	He tree his day in an a said	4	
In compliance with Rule be reimbursed/paid for r	:35,2(a) and (c), Lin ne. 1 also certify that	ake the following disclo I have attaobed:	surcs with respect to tra	vel expenses that have been or will
☐ The original Employ ☐ A conv of the Private	ez Pre-Travel Authòi e Sponsor Travel Cer	ization (Form RE-1), ciffication Form with all	AND attachments (itinerary,	invitee list, etc.)
Private Sponsor(s) (list a	all): The Pew Cha	ritable Trusts	<u> </u>	<u> </u>
Travel date(s): Septen	nber 15, 2017 - S	eptember 17, 2017		<u></u>
Name of accompanying Relationship to Travele	family incomber (if a	ny): N/A Child	<u> </u>	
IR THE COST OF LODG INCLUDE LODGING CO Expenses for Employe	J2J2 In Embroxer	EXBENSES. (Attach and	Hotal byBestrateconser's	
	Transportation:	Lodging Expenses	MealExpenses	Other Dripenses (Amount & Description)
Good Faith Estimate. Actual Amount.	\$116.27	\$286.00	\$128.00	N/A
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Expenses for Accomp	Transportation "	pendeut Child (If appl Lodging Expenses	Ment Expenses	Other Expenses
	Expenses			NIA NIA
D Good Faith Estimate	N/A	N/A	N/A	N/A
Actual Amount				
Provide a description on necessary.): See atta	of all meetings and e sched agenda.	vents attended. See Sch	tc Rule 35:2(c)(6): (At	tach additional pages if
			1/2	
9/25/17	Walin Pa	WAD!	U)	J
(Date)	(Printed	name of traveler)		(Signature of traveler)
·		MEMBER/OFFICER	•	
I have made a delermit	ration that the expense necessary transports	ses set out above in comation, lodging, and relat	rections with travel desc ed expenses as defined i	in Rule 35.
4/25/17		بر. منسف سب	amul Dich	Will Control of the second of
(Date) (Revised 1/3/11)		-	(Signature of Syster	vising Senator/Officer) Form RE-2

Date/Time Sta	ւոր
	· •

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics senate gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler:	Kalina Baka	lov -	·
Employing Office/Committee:	Office of U.S. Senat	or Tammy Duckwo	rth
Private Sponsor(s) (list all): The Pew (Charitable Trusts		
15 September 2017 -	17 September 2017	To a 100 miles in the side in	
Note: If you plan to extend the ti	Ip for any reason you <u>must</u> notify to	ne Committee.	
Destination(s): Richmond, VA			
Explain how this trip is specifically con	rected to the traveler's official or ro	presentational duties:	<u> </u>
This trip will include seminars to provide public policy insights what and legislative agenda.	help me develop communica hich will help me better lead th	ations and eadersh ne Senator's Washi	ip skills. It will also ngton D.C. staff
Name of accompanying family member. Relationship to Employee: Spouse	Child:		les es iled ent
I certify that the information contained	n this form is true, complete and co	meet to the best of my	∽ Kù⊙MicdRä:
8/28/17			· · · · · · · · · · · · · · · · · · ·
(Date)	•	(Signature of Emp	loyec)
TO BE COMPLETED BY SUPERVISING Secretary for the Majority, Secretary for the Lamon Tuckworth	:Minority, and Chaplain):	e Senate, Secretary of this	
(Print Senator's/Officer's Name	C licitory and donze	(Print Traveler's	
an employee under my direct supervision related expenses for travel to the event duties as a Senate employee or an office private gain.	described above. I have determined	I that this travel is in co	unection with his of her
I have also determined that the attendar of the Senate. (signify "yes" by checking	nce of the employee's spouse or chil	d is appropriate to assi	st in the representation
8/28/17	10	many life	John Land
(Revised (0/19/15)	(Sign	ature of Stpervising Sene	<i>rior/Officer)</i> Form RE-1

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1.	Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
••	
2.	Description of the trip: Senate Chiefs of Staff Management and Leadership Retreat
3.	Dates of travel: September 15-17, 2017
ر. 4.	Place of travel: Richmond, VA
5.	Name and title of Senate invitees: Chiefs of Staff
6 .	I certify that the trip fits one of the following categories: (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip. - OR -
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7.	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal. - AND-
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8.	I certify that: The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement. - AND -
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) 1 certify that if the sponsor or sponsors retain or employ one or more registered foreign principal, one of the following scenarios applies:	l lobbyists or agents of a
	(A) The trip is for attendance or participation in a one-day event (exclusive overnight stay) and no registered lobbyists or agents of a foreign principal officer, or employee on any segment of the trip. - OR =	ve of travel time and one will accompany the Member,
	 (B) The trip is for attendance or participation in a one-day event (exclusion overnight stays) and no registered lobbyists or agents of a foreign principal Member, officer, or employee on any segment of the trip (see questions δ – OR – 	il will accompany the
	(C) The trip is being sponsored only by an organization or organizations of the Internal Revenue Code of 1986 and no registered lobbyists or agent accompany the Member, officer, or employee at any point throughout the	s of a foreign principal will
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is Senate invitees to participate in the travel:	practically required for
11.	An itinerary for the trip is attached to this form. I certify that the attached by-hour), complete, and final itinerary for the trip.	itinerary is a detailed (hour-
12.	Briefly describe the role of each sponsor in organizing and conducting the tri	p:
	The Pew Charitable Trusts is the sole organizer and sponsor of this trip.	
13.	Briefly describe the stated mission of each sponsor and how the purpose of the See attachment.	e trip relates to that mission:
14.		os:
	See attachment.	
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See attachment.			:		
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Total Expenses for E	ach Participant:				
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	Expenses	Expenses	Se American Services	**************************************	
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⊠ Good Faith	\$44.51/local				
estimate	transportation				
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Participation or b) the congressional participation. This trip has been an Reason for selecting Richmond was selected. The Jefferson Hotel The Jefferson Hotel.	e trip involves an event pation: ranged specifically with the location of the event cted due to its close provide the lodging and lotel or other lodging ing hotel or other lodging can provide the necessions.	that is arranged or or regard to congression or trip dimity to Washington facility: Richmond, VA 23. g facility: ary meeting space	n, DC and its	istoric	al significance.
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L	odging and meals are at the per diem rate for Richmond, VA.
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c t	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first lass transportation will be provided. If first-class fare is being provided, please explain why first-class ravel is necessary:
•	Transportation to Richmond will be provided via Amtrak using the lowest coach fare. Transportation back
- -	o Washington, DC, will be via coach bus.
	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
]	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why he entertainment is an integral part of the event:
	N/A
•	I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.): Signature of Travel Sponsor:
	Name and Title: David Gilliland, Officer
	Name of Organization: The Pew Charitable Trusts
	Address:
	Telephone Number: (202) 552-2145
	Fax Number: (202) 552-2299
	E-mail Address: dgilliland@pewtrusts.org

Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and Leadership Retreat, September 15-17, 2017

- 1-10. See form
- 11. See attachment.
- 12. See form.
- 13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the retreat is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
- 14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the sixth Senate chiefs of staff retreat hosted by Pew (2007, 2009, 2011, 2014, 2015). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
- 15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.
- 16. See form.
- 17. See form.
- 18. See form.
- 19. See form.
- 20. See form.
- 21. See form.
- 22. See form.
- 23. See form.
- 24. See form.
- 25. See form.



Bipartisan Senate Chiefs of Staff Conference Richmond, Virginia | September 15-17, 2017



Friday, September 15, 2017

2:30pm Depart Union Station via Amtrak 95 (coach fare)

5:15pm Arrive Main Street Station, Richmond

5:30pm Travel via bus to Jefferson Hotel, 101 W. Franklin Street

5:40pm Arrive Jefferson Hotel, check in (GSA per diem rate)

7:30-9:30pm Dinner with keynote speaker Historian Alexander Rose, author of

Washington's Spies: The Story of America's First Spy Ring (now the TV show "Turn: Washington's Spies). Review agenda and

goals of conference. (Empire Room)

Saturday, September 16, 2017

8:30-9:30am Breakfast at your leisure, Jefferson Hotel (Rotunda)

9:30-11:30am Breakthrough Communication: Navigating High-Stakes

Conversations, Peter and Susan Glaser

Communication skills are the first step in developing strong relationships, making quality decisions, and creating high performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development. Participants learn communication models to understand and transform high-stakes conversations into a powerful

and effective stimulus for change. (Grand Ballroom)

11:30am-12:00pm Break

12:00-1:15pm Lunch with speaker Larry Sabato, the University of Virginia

(Ginter Gallery)

1:15-2:30pm State of the News Media, Amy Mitchell, Pew Research Center

Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry itself, one that impacts the experiences of even those news consumers unaware of the tectonic shifts taking place. Amy

Mitchell will brief chiefs on the annual "State of the News Media" report and its implications on public policy. (Grand Ballroom)

Conference Schedule

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2:30-2:45pm Break

2:45-3:45pm

How Technology, Robotics and Automation May Affect the
U.S. Economy in the Future, David Pogue, Yahoo Technology

David Pogue is the tech critic for Yahoo Finance, and was previously the personal-technology columnist for the New York Times for 13 years. He's also a monthly columnist for Scientific American and host of science shows on PBS's "NOVA," and a correspondent for "CBS Sunday Morning" since 2002. (Grand

Ballroom)

6:00pm Buses depart for Governor's Mansion

6:15pm Arrive Governor's Mansion, Capitol Square

6:30-8:00pm Reception - Remarks by Gov. Terry McAuliffe

8:00pm Buses Depart for Jefferson Hotel

Sunday, September 17, 2017

8:00-9:00am Breakfast at your leisure, Jefferson Hotel - Bag Call (Empire Room)

9:05-9:15am Greeting from Senator Tim Kaine (Grand Ballroom)

9:15-10:15am It's the Economy - Bill McInturff, Public Opinion Strategies, and Geoff

Garin, Hart Research

Pollsters McInturff and Garin will explore Americans' attitudes and views regarding jobs, the economy and the current state of the "American Dream" to better inform chiefs of staff as they tackle legislation in these areas. (Grand

Ballroom)

10:15-12:00pm Presidential Recordings - The Executive/Legislative Branch Relationship

Through History, Marc Selverstone, the Miller Center at UVA
To assist chiefs in gaining a better understanding of effective working

relationships between the legislative and executive branches, this session will explore the interactions between the president and Senate leadership over the years through the Miller Center's exhaustive collection of Oval Office

recordings from Kennedy through Nixon. (Grand Ballroom)

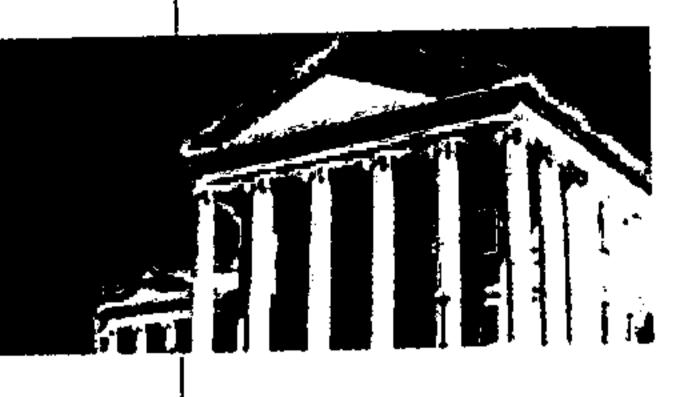
12:00pm Pick up box lunches

12:15pm Buses depart Jefferson Hotel for Washington

3:00pm (approx.) Arrive Union Station parking garage



Bipartisan Senate Chiefs of Staff Conference Richmond, Virginia | September 15-17, 2017



CHIEF OF STAFF	SENATOR	GUEST
Nathan Barankin	Sen. Kamala D. Harris	Ann Patterson
Allyson Bell	Sen. Mike S. Lee	
Sarah Benzing	Sen. Sherrod C. Brown	
Adam Bramwell	Sen. Christopher A. Coons	Laurie Syms
Katie Britt	Sen. Richard C. Shelby	Wesley Britt
Brennen Britton	Sen. Jerry Moran	
Joe Britton	Sen. Martin T. Heinrich	
John Connell	Sen. Todd C. Young	Marjorie Connell
Jackie Cottrell	Sen. Pat Roberts	
Michaeleen Crowell	Sen. Bernie Sanders	James Crowell
Jonathan Davidson	Sen. Michael F. Bennet	
J.P. Dowd	Sen. Patrick J. Leahy	Kara Dowd
Kaitlin Fahey	Sen. Tammy Duckworth	Kalina Bakalov
Dan Geldon	Sen. Elizabeth A. Warren	Heather Geldon
Kristen Gentile	Sen. Robert P. Casey Jr.	
Sam Goodstein	Sen. Sheldon Whitehouse	
Joseph Hack	Sen. Deb Fischer	
Brigit Helgen	Sen. Amy Klobuchar	
Mike Henry	Sen. Tim Kaine	
Allison Herwitt	Sen. Chris S. Murphy	
Natasha Hickman	Sen. Richard Burr	
Luke Holland	Sen. Jim Inhofe	
Mark Isakowitz	Sen. Rob J. Portman	
Beth Jafari	Sen. John Cornyn III	Sara Garland
Maura Keefe	Sen. Jeanne Shaheen	Tom O'Donnell

(over)

CHIEF OF STAFF	SENATOR	GUEST
Joan Kirchner Carr	Sen. Johnny Isakson	Chris Carr
Matthew Klapper	Sen. Cory A. Booker	Victoria Edelman
Jill Kozeny	Sen. Chuck Grassley	
Betsy Lin	Sen. Mazie K. Hirono	Jennifer Duck
Chris Lynch	Sen. Ben L. Cardin	Maggie Lynch
Michael Lynch	Sen. Chuck Schumer	
Jeff Michels	Sen. Ron Wyden	Susan Michels
Bill Murat	Sen. Tammy Baldwin	
Aaron Murphy	Sen. Jon Tester	
Bianca Ortiz Wertheim	Sen. Tom S. Udall	John Wertheim
Monica Popp	Senate Majority Whip	
James Quinn	Sen. Bill Cassidy	Shannon Quinn
Susie Perez Quinn	Sen. Bill Nelson	Tom Quinn
Kay Rand	Sen. Angus S. King Jr.	
Karen Robb	Sen. Chris Van Hollen	
Natalie Rogers	Sen. Cory Gardner	
Matt Sandgren	Sen. Orrin G. Hatch	
Tara Shaw	Sen. Mike B. Enzi	
Jason Thielman	Sen. Steve Daines	Erin Thielman
Helen Tolar	Sen. John N. Boozman	Mac Tolar
Matt VanKuiken	Sen. Debbie A. Stabenow	
Erin Vaughn	Sen. Charles E. Schumer	
Susan Wheeler	Sen. Mike D. Crapo	Joe Wheeler
Todd Womack	Sen. Bob P. Corker	Katie Womack
Mike Zamore	Sen. Jeff A. Merkley	Abigail Smith
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THE PEW CHARITABLE TRUSTS



Bipartisan Senate Chiefs of Staff Retreat

The Pew Charitable Trusts

Invites You and Your Spouse To the 6th Biennial

Senate Chiefs of Staff Management and Leadership Retreat

Richmond, Virginia September 15-17, 2017

The Pew Charitable Trusts will host a retreat for the Senate Chiefs of Staff from September 15-17, 2017, in Richmond, Virginia. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the draft agenda is attached.

We will depart Union Station on Friday, September 15, at 2:30 p/m., on a reserved Amtrak car and return via bus on Sunday, September 17, arriving back at the Capitol at approximately 2:15 p.m. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. If you wish to invite your spouse, you may reimburse Pew for those expenses (estimated at around \$250).

Please <u>click here</u> to register, and we look forward to seeing you in historic Richmond this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
tluzzatto@pewtrusts.org
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

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